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3 December 1951

DECISIONS IN DEVELOPING AN APPRAISAL SYSTEM

Some of the factors to be considered in developing an appraisal form and procedure are listed below.

1. What Factors should be Appraised?

The factors to be appraised are those which are important in the type endeavor in which the appraisal form is to be used. Hence, the selection of these factors must be based on a knowledge of the jobs to be performed.

2. What should the Form Cover?

The appraisal form covers the factors which make for success or failure on the job. Most forms conclude with promotion potential and development program (action to be taken). Some forms include notation concerning discussion of the appraisal with the person evaluated.

3. What General Type Appraisal Form should be Used?

Should it be:

a. Check-list?

The rater checks the statement which best describes the person being evaluated. The check-list enables the rater to "touch all bases" in minimum time. The completed form gives a quick, glance picture of the person rated.

b. Free Comment?

Instead of checking a prepared statement, the rater gives his word picture of the man on each quality appraised. The rater is often asked to cite facts and examples to back up his statements. Free comment is more time-consuming, but less "mechanical" than a check-list.

c. A Combination of the Two?

As a practical matter, most forms combine check-list and free comment in varying degrees (e.g. a check-list in appraising performance factors; free comment in discussing promotion potential and development program).

d. **Forced Choice?**

Here the water absorption capacity of the one
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 which is most descriptive and the one least descriptive

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of the person rated. The trick in developing a forced choice form is to develop certain statements which differentiate between good and poor performance. The rater doesn't know whether he is checking one of the "G.I. dollar" statements, or merely an innocuous one. Hence, the personal bias of the rater is eliminated from the rating. The preparation of a forced choice appraisal form requires extensive research.

4. How should the Appraisal be Prepared?

Should it be prepared:

a. By Immediate Supervisor alone? or by Several People?

It is generally considered preferable to get appraisal by two or three people who know the man and his work.

b. If Prepared by Several People, Should it be done on an Individual or Group Basis?

It is often said that the consensus appraisal of several evaluators working as a group is better than the sum of their individual appraisals prepared independently of each other. The danger of the group appraisal is that it may result in a compromise opinion which is really nobody's opinion, or else that one individual may unduly sway the group.

c. How should the Appraisal be Reviewed?

By an individual, or group, or both.

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